



**Principal National Life Insurance Company**  
**Principal Life Insurance Company**

P.O. Box 10431, Des Moines, IA 50306-0431

[www.principal.com](http://www.principal.com)

Your policy indicates its issuer, which is the company responsible for the policy obligations and is referred to herein as the 'Company'.

**Private Split Dollar  
Submission Checklist**

For Assistance: 800-654-4278,  
options 4,2,3

<b>Design</b>	<input type="checkbox"/> Economic Benefit Regime <input type="checkbox"/> Loan Regime
<b>Irrevocable Life Insurance Trust (ILIT) Information</b>	Trust Name: _____ Trust Date: _____ Trust Tax ID: _____ Name of Trustee: _____ Address: _____ _____ Trustee Phone #: _____ Trustee Email: _____
<b>Billing</b>	Send copy of each bill to Sponsor/Premium Payer? (N/A with EFT/autopay) <input type="checkbox"/> Yes <input type="checkbox"/> No, send only to ILIT/policyowner  If Yes... Sponsor Name: _____ Address: _____ _____ Phone #: _____
<b>Plan Submission</b>	<b>Submit the following:</b> <input type="checkbox"/> This Private Split Dollar Submission Checklist <input type="checkbox"/> Life Insurance Application <input type="checkbox"/> Life Insurance Illustration/Quotation <b>or</b> corresponding Disclosure - (N/A for <b>Term</b> insurance) <input type="checkbox"/> Trust Certification and Indemnification form RF 971 <input type="checkbox"/> Plan Agreement: If Economic Benefit Regime:    Copy of Private Split Dollar Agreement If Loan Regime:                    Copy of Loan Agreement and Promissory Note <input type="checkbox"/> DD 9215 - Split Dollar Restrictive Assignment of Life Insurance Policy as Collateral form (if applicable)